

Application Overview

TDTracStaff is a mobile ready application to facilitate tracking staffing, payroll, and expenditures on a gig basis. It is fully interactive, and the general use flow goes something like:

1. An administrator adds job details, including a title, description, a category or company name, start and end dates, a freeform time of day, the date payroll for this job must be entered, and the date that checks will be disbursed for the job.
2. The administrator then adds staffing requirements for that job based on a pre-configured list of available job titles.
3. Optionally, the administrator can choose to e-mail each employee in the database that is qualified for one of those job titles that there is a new job in the system awaiting their feedback
4. Each employee logs in to the system and indicates if they are available or busy for each of the job titles offered.
5. The administrator can then select which employees will be working the job, and optionally e-mails those employees that responded to let them know that staffing decisions have been made.
6. After working the job, each employee can log into the system and indicate what hours they worked
7. The administrator can then log back in, and enter payroll data into their paycheck system - be it quickbooks, hand cut checks, or whatever. At that time, they can mark those hours "paid" to prevent the employee from later editing them, and let the employee know that those hours will appear on their paycheck when it is ready.

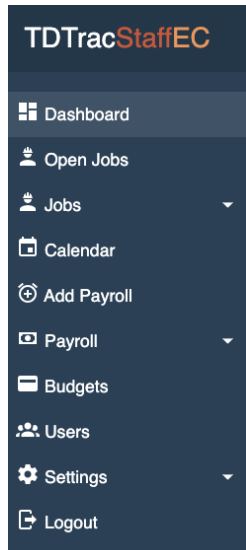
Terminology Used

There is some common terminology used throughout this document and the system.

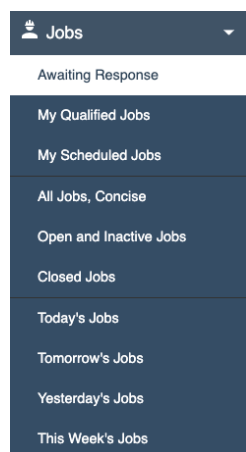
Administrator	Administrators can do anything in the system, usually without limits, except budgeting. The system assumes that an administrator is <i>*also*</i> an employee.
Budget User	Users that are able to affect the budget on jobs that have one. They may only edit their own budget line items, unless they are also an administrator.
Regular User	Users that have a limited number of actions they can perform, and may only interact with their own data in the system.
Job	The organizational unit for the system. Every budget item or payroll item is part of a job
Job Title	A role or task to be performed on a job site. Employees may have multiple titles, even on the same job.
Budget Job	Jobs that will have tracked budget information. Defaults to no.
Payroll Job	Jobs that will have tracked payroll information. Defaults to yes.
Active Jobs	Active jobs are those jobs that are incomplete and still accepting payroll, availability, and staffing info.
Open, Inactive Jobs	Completed jobs that are awaiting paychecks. Regular users still see these jobs - and can use them to estimate their next paycheck.
Closed Jobs	Completed, paid jobs. Regular users do not see these jobs typically (but can still access them by direct link)
Unpaid Hours	Those payroll hours not yet accepted by an administrator. They can be edited or removed by the regular user.
Paid Hours	Payroll hours accepted and paid by an administrator. They can only be edited by an administrator.

The Side Menu

The side menu appears on every single page of the site. It's contents can change depending on context, and the access level of the logged in user.

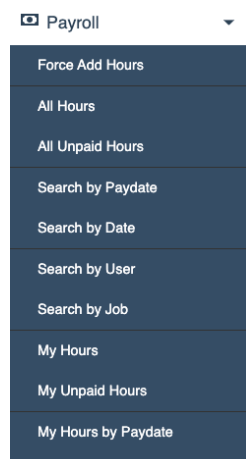


Dashboard	A quick overview of all the data in the running system.
Open Jobs	View open jobs in the system
Jobs Sub Menu	See section below
Calendar	An in-system calendar display of all open jobs
Add Payroll	Add a payroll entry
Payroll Sub Menu	See section below
Budgets	View the budgets for each job. Only appears for budget users.
Users	View or edit the list of registered users.
Settings Sub Menu	See section below
Logout	Safely leave the current system



JOBS SECTION

Awaiting Response	Those jobs awaiting your availability response
My Qualified Jobs	Those jobs you qualify for based on your job titles
My Scheduled Jobs	Those jobs you are scheduled to work
All Jobs, Concise	A concise list of all the jobs in the system
Open & Inactive Jobs	Those jobs that are still open, but inactive.
Closed Jobs	Those jobs that are closed
Today's Jobs	Those jobs that are happening today
Tomorrow's Jobs	Those jobs that are happening tomorrow
Yesterday's Jobs	Those jobs that happened yesterday
This Week's Jobs	Those jobs happening this calendar week (Sun->Sat)



PAYROLL SECTION

Force Add Hours	Add hours to the system for other employees. Use with care.
All Hours	All payroll hours in the system
All Unpaid Hours	All unpaid payroll hours in the system
Search by Paydate	Search for hours based on the job paydate
Search by Date	Search for hours based on the date worked
Search by User	List hours by employee
Search by Job	List hours by job
My Hours	All of your hours
My Unpaid Hours	All of your hours that are currently unpaid
My Hours by Paydate	Search your hours by job paydate.

SETTINGS SECTION

Settings

Worker Titles

Configuration

Worker Titles

Set up titles / roles / tasks to be performed at jobs.

Configuration

Configure the running system.

System Settings

This section allows configuration of the running system. Each setting value contains a detailed description of how to use the setting. Please read carefully before making any changes.

Setting Name	Description	Actions
admin-email	The administrator's E-Mail Address	View Edit
admin-name	The administrator's Name	View Edit
allow-unscheduled-hours	Allow adding hours to jobs the user is not scheduled for. (0 /1)	View Edit
calendar-api-key	Key for iCal (ics) access - probably a UUID or hash or password - that is sent in cleartext.	View Edit
job-new-email	Sent when a job is newly added to the database and needs staff to indicate availability	View Edit
job-old-email	Sent when a job is NOT newly added to the database and either STILL needs staff to indicate availability, or staffing needs have changed	View Edit
long-name	Long name of the system, usually a company name	View Edit
mailing-address	Mailing Address of the company - used in E-Mails.	View Edit
notify-email	Email sent when you have scheduled 1 or more staff members.	View Edit
paydates-fixed	Set of fixed paydate, in the fixed format: [[-1,-1,15], [-1,-1,30]] (15th and 30th) or false	View Edit
paydates-period	Set of period paydate, in the format ["2019-09-11", 14] (start, period) or false	View Edit
require-hours	Require hours worked, rather than just a total - must be 0 (use a total), or 1 (use start and end times)	View Edit
server-name	FQDN, with protocol of the server name	View Edit
short-name	Short name of the Site, usually Initials	View Edit
welcome-email	The welcome E-Mail	View Edit

Worker Titles



Worker titles refer to tasks, titles, or duties to be done for each job. Each employee (user) can be trained for multiple titles, and the system does not prevent employees from filling multiple titles for the same job. From this display, you can also see what employees are trained for each position.

Sort	Title	Description	Actions
1	Help Desk	Offsite Help	Workers Edit Remove
100	Field Lead	In charge of all on-site aspects, main contact person on-site	Workers Edit Remove
101	Shop Lead	In charge of all pre-site aspects, main contact person at shop	Workers Edit Remove
201	Event Tech I - Audio	On site audio technician	Workers Edit Remove
202	Event Tech I - Lighting	On site lighting technician	Workers Edit Remove
203	Event Tech I - Video	On site video technician	Workers Edit Remove

User List

The user list shows all employees in the system. User images are gravatar icons (based on e-mail address - visit gravatar.com to sign up and upload your own). User status is shown as well - the most basic users will show as 3 green buttons - administrator or budget flags are more visible, and inactive (disabled) users will be shown in bright red.

From this display, you can view user details, reset a password, edit worker titles, and view associated payroll.

 Balistreri, Leonor Field Lead	paolo12@example.net	Active Non-Budget Regular	1/1/70, 10:00 AM	View Payroll Hours Change Pass Edit Titles Remove
 Bergnaum, Zora Help Desk Event Tech I - Audio Event Tech I - Video Driver Intern	swunsch@example.com	Active Budget Regular	1/1/70, 10:00 AM	View Payroll Hours Change Pass Edit Titles Remove

Job Listings

The job list shows an overview of the jobs in the system. Actions may be taken from this display, many of which are explained below. Also included are visual graphs of what percentage the job is staffed, and what percentage of the submitted hours have been paid.

Open, Active, Budget, and Payroll status appear as lights, with budget and payroll only appearing if they are set differently from the default.

The staff needed button shows a total of the staff required, the assignment button shows a ratio of those scheduled over those available. Note that the system does not prevent you over or under scheduling a job.

Company #3: Sunt totam eaque ut alias aliquid.

Open

Active

100% Staffed

75% Total Paid

Description
Voluptatem alias voluptatum ipsam qui et atque.

Location
200 Stokes Neck Suite 283, Halversonmouth, ND 22835-0132

Start Date
Wednesday, December 18, 2019

End Date
Sunday, December 22, 2019

Time(s)
Est nostrum vitae atque.

Payroll Due Date
Monday, December 23, 2019

All Hours Total
72.00

Paycheck Date
Wednesday, January 15, 2020

All Hours Unpaid
17.50

View Detail

My Availability

Add My Hours

View Payroll

View Budget

Print Scheduled

Staff Needed 13

Staff Assigned 13/25

Force Staff Assignments

Edit

Remove

Job Details - Overview

The job detail page breaks down the job into logical sections providing a complete, but concise visual of the job information

Company #3: Sunt totam eaque ut alias aliquid.

Open

Active

Budgeted

Edit Job

Description
Voluptatem alias voluptatum ipsam qui et atque.

Start Date
Wednesday, December 18, 2019

End Date
Sunday, December 22, 2019

Time(s)
Est nostrum vitae atque.

Payroll Due Date
Monday, December 23, 2019

Paycheck Date
Wednesday, January 15, 2020

Jobs are sorted by a combination of category/company and job title. This section provides the description, start and end dates, a freeform listing of time(s), the date the payroll is due, and when paychecks for this job are expected to be issued. In this particular instance, this job includes budgeting (expenditure) information.

Job Details - Your Information

This sections breaks down information about the job specific to you.

Your Information

[My Availability](#)

[Add My Hours](#)

[View My Payroll](#)

My Status

Interested

none

Your Hours Submitted

0.00

Your Hours Pending Payment

0.00

0% My Hours Paid

Here, you will find buttons to add availability information, add payroll hours, and view detailed payroll information. Your status - either Unavailable, Interested, or Scheduled - appears, along with an overview of your already submitted payroll information.

Job Details - Staffing Information

This sections breaks down information about the job staffing

Staffing Information

Staffing Required
13 - Help Desk (3), Field Lead (4), Shop Lead (1), Event Tech I - Lighting (2), and Driver (3)

[Print Scheduled](#)

[Set Staff Needed](#)

[E-Mail Needs](#)

[Assign Staff](#)

[Force Staff](#)

Staffing Assigned
13 - Shyann Brakus, Adele Cummings, Emmanuel Douglas (2), Adele Jones, Travis Kunze (2), Jackson Mosciski, Colin Mueller (2), Frederic Reichert (2), and Dorian Schuster

Staffing Available
25 - Leonor Balistreri, Shyann Brakus, Adele Cummings (2), Emmanuel Douglas (3), Amely Hudson (3), Adele Jones (2), Travis Kunze (2), Jackson Mosciski (2), Colin Mueller (2), Cassandre Okuneva, Frederic Reichert (2), Dell Runolfsdottir, Dorian Schuster (2), and Admin User

100% Staffed

This sections lists how many titles / roles / tasks need filled (along with a total), those employees that are scheduled, and those employees that have indicated that they are available for the job. When an employee is scheduled for more than one title / role for the job, the number of roles will be enclosed in parentheses - for example, "Colin Mueller" above will be filling 2 roles for this job. The "E-Mail Needs" button will send qualified employees an email announcing the job has requirements.

Job Details - Payroll Information

This sections breaks down information about the job payroll

Payroll Information

[View All Payroll](#)

[Force Add Payroll](#)

Total Hours Submitted

72.00

Total Hours Pending Payment

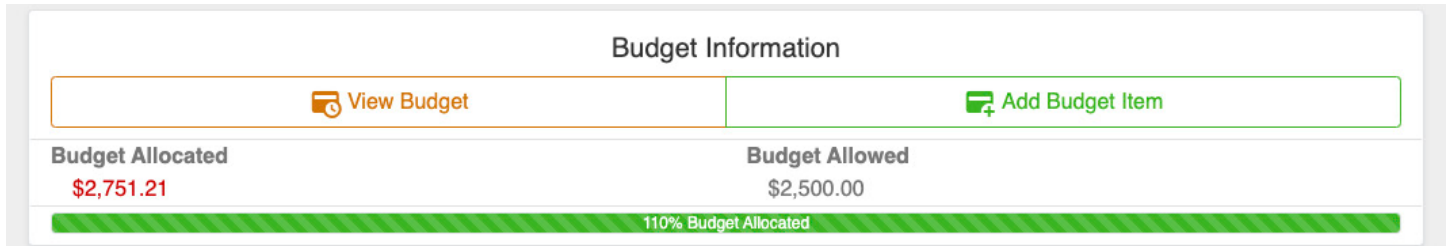
17.50

75% Total Hours Paid

Here, you will see an overview with graph of how much payroll is associated to the job, and how much is still to be paid out to employees.

Job Details - Budget Information

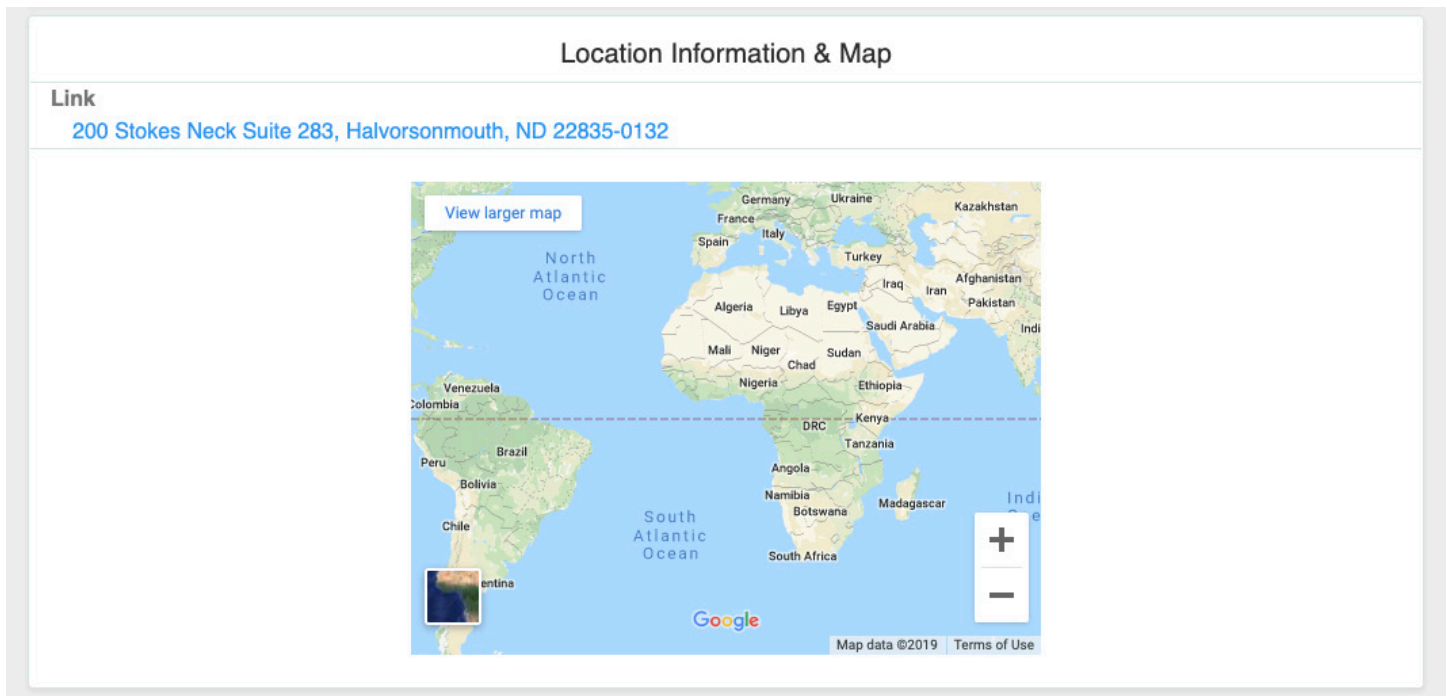
This sections breaks down information about the job budget



Here, you will see an overview of the entered expenditure data. Note that the “allowed” amount is set in the job edit screen, and the allocated amount is a sum of what was actually spent. Note too that the system does not prevent the job from going over budget, but does visually indicate it has happened.

Job Details - Location Information

This sections breaks down information about the job location.



When a proper address is added to the job, the map will show the proper location (the test data looks like a valid address, but they don't actually exist)

Staffing Requirements

This display is for setting the staffing requirements for each job. Each field takes an integer (whole number).

Staff Requirements - Sunt totam eaque ut alias aliquid.

Enter the number of each type of employee that you require for this job.

Help Desk

3

Offsite Help

Field Lead

4

In charge of all on-site aspects, main contact person on-site

Shop Lead

1

In charge of all pre-site aspects, main contact person at shop

Front Desk / Audio

0

Staffing Assignments

This display is for setting the staff assignments for each job. There exists another version of this page that will allow you to schedule staff while disregarding their availability schedule - use with care. The “notify of decision” button will send that employee an email letting them know that decisions have been made. There is no need to “notify” the same employee for every role.

Help Desk (Required: 3)		
User	Current Status	Actions
Adele Cummings	Interested, and Scheduled!	<div>Schedule</div> <div>Do NOT Schedule</div> <div>Notify of decision</div>
Emmanuel Douglas	Interested, and Scheduled!	<div>Schedule</div> <div>Do NOT Schedule</div> <div>Notify of decision</div>
Jackson Mosciski	Interested, not scheduled	<div>Schedule</div> <div>Do NOT Schedule</div> <div>Notify of decision</div>
Colin Mueller	Interested, and Scheduled!	<div>Schedule</div> <div>Do NOT Schedule</div> <div>Notify of decision</div>

Payroll Records

These displays show payroll entries.

User	Job	Date	Start Time	End Time	Hours	Paid?	Actions
Adele Cummings	Sunt totam eaque ut alias aliquid.	2019-12-20	09:30 am	17:15 pm	7.75	NO	<div>Mark</div> <div>Edit</div> <div>Remove</div>
Adele Cummings	Sunt totam eaque ut alias aliquid.	2019-12-18	11:00 am	18:15 pm	7.25	yes	<div>Edit</div>
Adele Cummings	Total Unpaid				7.75		
Adele Cummings	Total				15.00		

The mark button will mark the payroll as paid (without reloading the page - but the "Total Unpaid" row will be wrong after use.) Administrators may edit any payroll record, regular users can only edit those records that are currently unpaid. Paid entries can not be removed from the database.

At the bottom of each display is a button to export the current display is a CSV file for import into excel, and a button to mark all of the visible unpaid hours as paid.

Budget Records

These displays show budget (expenditure) entries.

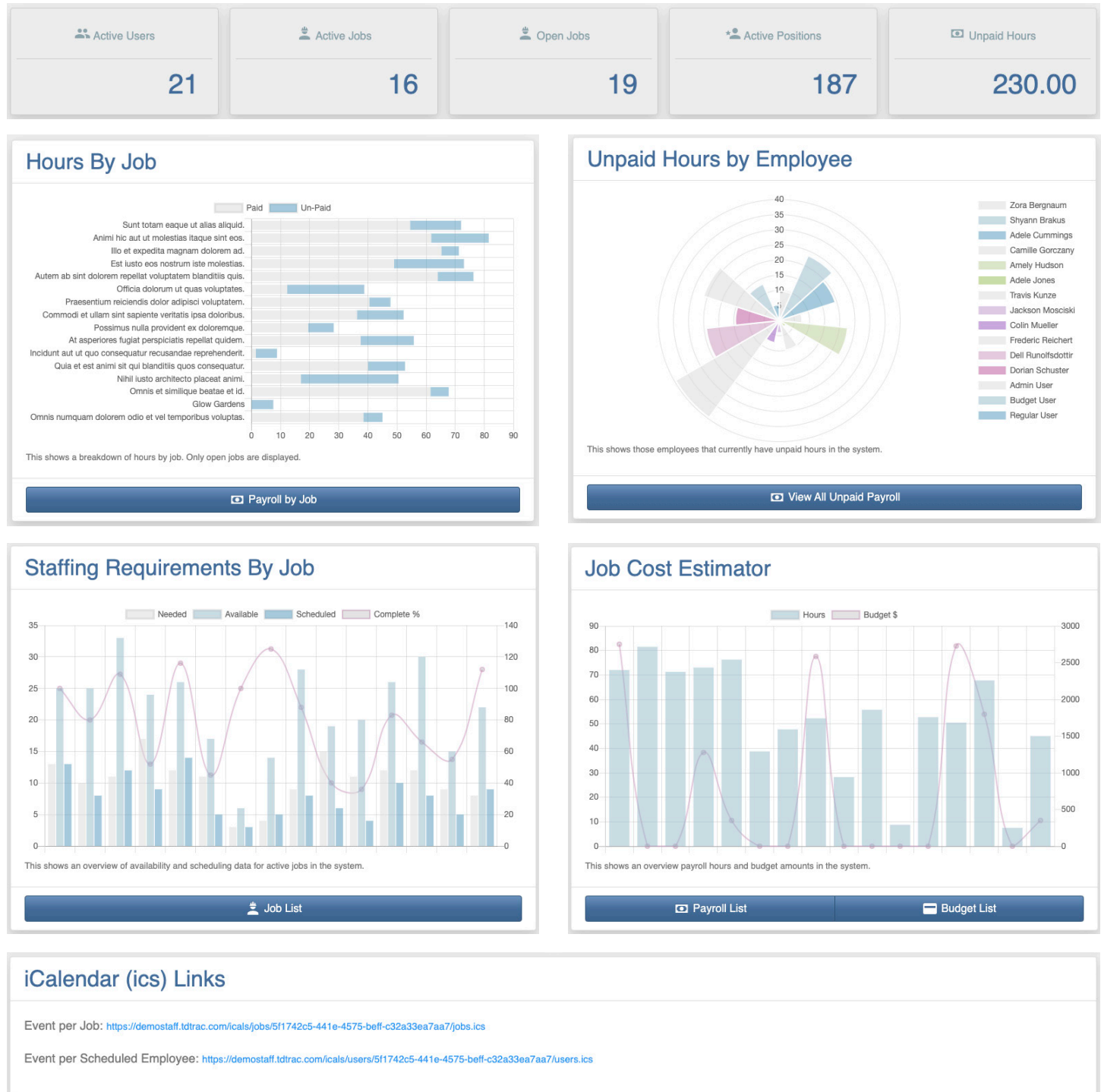
Date	Category	Vendor	Description	Amount	Added By	Actions
2019-12-18	Alias quaerat ab magnam.	Perferendis quo est ipsam ad.	Accusamus error similique dolor quae libero distinctio. Aut et quis unde eos consequatur dolor.	\$632.19	Stracke, Wade	<div>Remove</div>
2019-	Ducimus	Optio et eos	Id est amet qui vel. Placeat neque	\$632.19	Stracke, Wade	<div>Remove</div>

Category and Vendor will auto-suggest based on previously entered data. Administrators may remove any entry, non-administrators may only remove their own entries.

At the bottom of each display is a button to export the current display is a CSV file for import into excel

Dashboard

The dashboard displays a brief overview of all data



This last item is ics (iCalendar) links that can be added to phones, iCal on the mac, google calendar, etc. Check out “GAS-ICS-Sync” on google if you want to use google calendar and not wait 24-48hrs between updates.